



UNLOCKING VIETNAM'S AI POTENTIAL 2026

The next wave of AI is here

Vietnam's AI journey is entering a new phase. Adoption is rising – **26%** of businesses have now adopted AI (up from **18%** [last year](#), a year-on-year growth rate of **44%**) – and AI is becoming a mainstream business capability across the economy. More businesses are using AI, more are seeing measurable gains, and more expect AI to shape their future growth.

Businesses adopting the technology are reporting significant gains as a result of this adoption. **72%** of current adopters are capturing measurable productivity gains, and **64%** report that AI has increased their revenue (rising by an average of **15%**, above the **11%** businesses forecast last year). Looking ahead, businesses expect these gains to continue: **78%** of adopters anticipate AI-driven growth in the coming year.

As Vietnamese businesses look to build on this progress and realise further benefits from AI, the next steps will be crucial. As the next wave of AI emerges, such as agentic AI, physical AI, and advanced robotics, the rewards will be greatest for those businesses most prepared to harness it. Businesses with the right foundations – internal governance, skilled workers, and clear AI strategies – will be best placed to move quickly.

Vietnam's next step will centre on how to turn widespread adoption into capturing the technology's full potential. Many organisations are at the beginning of their adoption journey (the exploration and experimentation stages), while a small group has scaled AI across multiple functions or fully embedded it into core operations. These are promising steps in Vietnam's dynamic business landscape, where SMEs, large enterprises, digital-native startups, and sector leaders are all approaching AI from very different starting points.

Building these organisational foundations also requires businesses to demonstrate that AI is delivering value. While productivity gains, revenue growth, and positive returns are already visible, organisations require support measuring ROI or using performance metrics to guide future investment. Stronger measurement frameworks will be critical to moving from experimentation to evidence-led scaling.

Vietnam's policy environment is also evolving. In December 2025, the National Assembly passed the [Law on Artificial Intelligence \(No. 134/2025/QH15\)](#), which took effect on 1 March 2026 – making Vietnam one of the first countries in Southeast Asia to establish a dedicated, risk-based legal framework for AI. It sits alongside the Digital Technology Industry Law, the Personal Data Protection Law, and the Data Law. As these frameworks are implemented, businesses will need greater confidence and clarity on how the new requirements apply to them – particularly smaller organisations with limited compliance capacity. How the rules are translated into practical, predictable guidance will shape how quickly businesses feel able to scale AI adoption.

Businesses that combine AI adoption with stronger skills, internal governance, responsible use, and clear measurement will be best positioned to translate today's momentum into long-term productivity, innovation, and growth.

AI adoption in 2026: Our tracking data

- AI adoption in Vietnam is continuing to climb, with **26%** of businesses now having adopted AI, up from **18%** last year – an eight percentage-point gain, or a **44%** year-on-year growth rate
- In the past year alone, around 75,000 businesses adopted AI for the first time,¹ more than eight every hour, or roughly one every seven minutes, bringing the total to almost 245,000 businesses, out of the total estimation of active registered enterprises in Vietnam
- AI is a top priority: **69%** of all businesses say AI adoption is a top or high priority. **73%** say AI plays a critical or important role in their overall business strategy
- AI is driving gains: Among AI adopters, **72%** report productivity gains from AI (up from **66%** last year), and **78%** expect AI to increase the growth of their business in the next year. **64%** report that AI has increased their revenue, by an average of **15%**
- Those that are adopting agentic AI are realising the benefits faster than others: **68%** of such businesses report increased operational efficiency or productivity, and **61%** report faster decision-making and execution
- Innovation is accelerating: **66%** of those who have adopted AI say their timeline for innovation has accelerated in the past two years, rising to **74%** of startups
- Cloud adoption, the foundation of AI, is similarly strong: **52%** of businesses have adopted cloud technologies, up from **43%** last year
- Most adopters are in the exploration or experimentation phases (**61%**), positioning them to scale further as strategies and governance mature. **8%** of AI adopters have fully integrated the technology
- Businesses are optimistic and now building stronger measurement frameworks: **71%** of AI adopters say their investment has already broken even or better. The next step is formalising how they measure ROI. While **13%** say they have a clearly defined and consistently applied framework so far, **46%** say they lack a reliable way to measure AI ROI
- The next priority is organisational readiness: **17%** of businesses feel fully or very ready to adopt next-generation AI technologies such as agentic AI. **52%** cite shortages of AI and digital skills as a barrier to adopting AI. **21%** have a dedicated AI governance function, highlighting the need to strengthen internal capabilities as AI becomes more embedded across organisations





Vietnam's next AI opportunity: turning widespread experimentation into transformation

Looking deeper into how businesses are implementing AI, from initial experimentation to full transformation, many Vietnamese businesses are at the beginning of their adoption journey. Businesses are approaching AI from different starting points, with smaller organisations often facing different resource constraints, investment priorities and digital capabilities than larger enterprises – meaning adoption is progressing at different speeds across the economy, and successful scaling will take place at different paces across the business landscape:

Early stage:

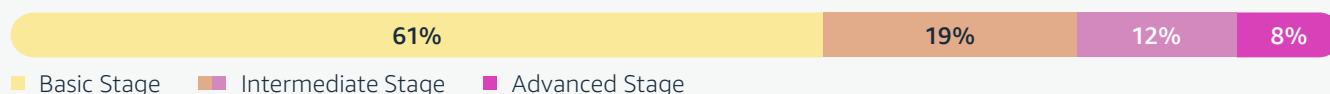
61% of adopters remain in the exploring or experimenting stages

Intermediate stage:

A further **19%** have moved to deploying AI in select functions, and **12%** report scaling AI across multiple business functions

Advanced stage:

8% say AI is fully integrated into operations and sits at the centre of business strategy



Vietnamese businesses are ambitious about their future use of AI. **84%** expect their use of AI to increase over the next 12 months, and **57%** believe significant untapped AI potential remains within their organisation.

Adoption is outpacing formalisation, a pattern common in fast-moving technology cycles. Today, **23%** of AI-adopting firms report a formal and comprehensive AI strategy – nearly double the **12%** recorded last year – with **28%** having established a formal data governance framework and **19%** implementing comprehensive responsible AI frameworks covering governance, oversight and risk management. As more organisations move from experimentation to production, these foundations are expected to follow, creating a clear opportunity for businesses to differentiate by investing in governance now.

Vietnam's next phase of AI adoption will depend on ensuring businesses of all sizes are able to progress from experimentation to transformation. Increasingly, the differentiators are organisational strategy, governance, workforce capability, and technical readiness. These are the foundations that enable businesses to move beyond experimenting with AI to embedding it across operations and using it to develop new products, services, and business models. As next-generation AI technologies such as agentic AI emerge and innovation cycles continue to accelerate, helping businesses of all sizes move beyond early-stage adoption and towards organisation-wide transformation will be critical if Vietnam is to capture the full economic potential of AI.



Businesses need support to prove AI's value

As AI investment grows, Vietnamese businesses are naturally starting to address low confidence in measurement and more clearly quantify reported gains – yet greater support is needed on this journey. The research suggests that while organisations are becoming more sophisticated in their approach to measurement, many still lack confidence in their ability to evaluate success.

The research is encouraging on returns themselves: **64%** of adopters report that AI has increased their revenue, by an average of **15%**. Even as they recognise these operational impacts, many have not yet finalised institutionalised accounting frameworks. This is a crucial next step for businesses measuring ROI and supporting the case for further investment.

As AI investment accelerates, organisations are prioritising building the measurement frameworks needed to quantify returns. Stronger ROI evidence will help unlock further investment and support the case for scaling. **13%** say they have a clearly defined and consistently applied framework for what constitutes a successful AI deployment – a defined set of criteria for judging whether any given AI project has been successful. However, nearly half of organisations (**46%**) say they lack a reliable way to measure AI ROI, making it one of the most significant barriers to scaling investment. One in three (**34%**) report being confident in their ability to accurately measure ROI from AI projects – though this confidence may rest on partial or informal approaches rather than rigorous methodology.

Among organisations that measure AI performance, the focus is often on activity instead of outcomes:



41% say they primarily track activity and usage metrics such as adoption rates, queries processed, or time saved



27% primarily track business outcome metrics such as revenue impact, cost savings, or customer satisfaction



29% track a roughly equal mix of both

Measurement of ROI is also not yet consistently embedded in AI decision-making. While **22%** of organisations say AI performance metrics directly determine whether projects are scaled or discontinued, **41%** say metrics inform decisions but are not consistently applied, and **27%** report that metrics rarely or never influence decisions to scale or stop AI projects.

Embedding measurement into AI decision-making is the clear next priority.

Sector spotlight: Financial services is demonstrating what good looks like

41% of financial services organisations are currently using AI, compared with **26%** of businesses overall. Within the sector, **52%** are consistently using multiple AI tools or technologies, suggesting a broader and more embedded pattern of adoption than in many other industries.

This maturity is visible in how AI is applied. Financial services organisations are more likely than most sectors to use AI for data analysis, fraud detection and prevention, and higher-level decision support, and are more likely to report productivity gains in financial operations.

Key findings include:

16% of financial services organisations say AI is fully integrated into operations, compared with **8%** of AI-adopting businesses overall

16%

57% are using AI for fraud detection and prevention, compared with **21%** across all sectors

57%

66% are using AI to support data analysis, compared with **43%** overall

66%

79% report productivity gains, compared to **72%** across the wider business landscape

79%

However, financial services also illustrates the constraints that even more advanced sectors face.

49% cite shortages of AI and digital skills as a barrier to adopting or expanding AI

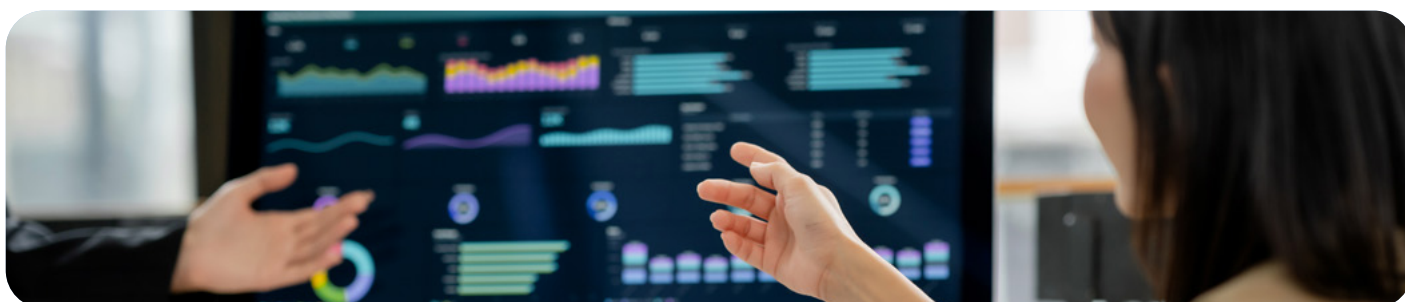
49%

While **51%** point to technical or data-related barriers such as legacy systems, poor data quality, or integration challenges for why they are not able to move faster in adopting the technology

51%

As financial services organisations move beyond experimentation and begin deploying AI in higher-value, business-critical functions, governance becomes increasingly important to ensure AI can be scaled safely, responsibly, and consistently. **38%** of financial services organisations report having a formal AI strategy or roadmap (compared to **23%** from the wider business population), while **29%** have a formal responsible AI framework (compared to **19%** from the wider business population).

The experience of financial services demonstrates both the opportunities and the constraints facing Vietnamese businesses. AI can deliver measurable operational benefits, particularly in high-value functions such as fraud detection, risk monitoring, and financial forecasting. But scaling those benefits requires more than adoption alone: it depends on skilled talent, strong data foundations, effective governance, and clear measurement frameworks. Alongside these organisational capabilities, a supportive policy environment will be important to enable continued innovation in financial services. As AI use cases become more sophisticated and data-intensive, policies that facilitate responsible data use and reduce unnecessary barriers to innovation will help ensure organisations can continue to scale AI securely and effectively.



Case Study: TCBS is deploying agentic AI to drive innovation



TCBS, one of Vietnam's leading technology-driven securities firms and a subsidiary of Techcombank, has fully deployed Kiro, AWS's agentic AI-powered software development environment, across its entire organization of over 460 users - including **100%** of engineers and **40%** of non-technical staff.

With Kiro, TCBS reduced feature-delivery time by nearly **25%** from backlog to product release, and delivered three major platform capabilities in a single quarter, each ahead of schedule: iPO platform, the Vietnam's first fully online IPO investment experience (**26,220+** investors, 2.5x oversubscription), a Non-Prefunding capability for foreign institutional investors, and TCWealth Goal-Based Investing (40,000+ users, **49.8%** conversion rate). Approximately **70%** of AI-generated code passes review on first attempt with zero production incidents.

"Adopting Kiro across our entire organisation has changed the economics of innovation for TCBS, enabling us to ship financial products faster, respond to market opportunities more quickly, and deliver more value to our investors." – Nguyen Xuan Minh, Chairman of the Board of Directors of TCBS





Businesses must now look to the next wave of AI: Agentic AI

Some Vietnamese businesses are already looking to the next wave of the technology, including agentic AI, physical AI, and advanced robotics. The frontier is moving quickly, and businesses that are prepared to adopt these technologies are likely to gain a competitive advantage.

Awareness of agentic AI is in the early stages, reflecting how new the technology still is for many businesses. Just under four in ten businesses (**38%**) say they have heard of agentic AI. Among these businesses, **4%** report having fully deployed it, while a further **19%** are experimenting with or piloting it.

But these businesses are reaping outsized rewards. When asked how agentic AI is driving their business and innovation, **68%** of agentic AI adopters report increased operational efficiency or productivity, **61%** report faster decision-making and execution, and **49%** report improved scalability of operations.

Among agentic AI adopters

81% report productivity gains from AI

Compared to **72%** of AI adopters overall

81%

72%

86% expect AI to increase the growth of their business in the next year

Compared to **78%** of AI adopters overall

86%

78%

73% report that AI has increased their revenue, by an average of around **18%**

Compared to **64%** of AI adopters overall who report an increase in revenue, by an average of **15%**

73%

64%

The more important finding is where businesses expect to go next. **46%** of those who have heard of agentic AI say they have plans to use the technology or are considering it, highlighting strong appetite for the next generation of AI even while deployment remains in its initial stages.

With strong demand signals established, the next step is building the readiness to act on them. Currently, **17%** of businesses say they feel fully or very ready to adopt next-generation AI. Businesses in information and communication lead at **34%**, followed by financial services (**31%**) and startups (**29%**), pointing to clear models for the rest of the economy to follow. **41%** of all businesses say they are only somewhat ready, **25%** say they are slightly ready, and **13%** are not ready at all to adopt next-gen AI.

Businesses cite the following reasons as to why they don't feel prepared for the next generation of AI:

- **52%** cite a shortage of AI and digital skills as a barrier to adopting next-generation technologies, while **44%** cite technical or data-related barriers
- **37%** cite insufficient internal workforce capacity
- **33%** cite limited access to next-generation AI tools or infrastructure

Case Study: Diaflow scales AI Agent orchestration globally on AWS



Diaflow is an enterprise-grade AI Agent orchestration platform built in Vietnam and scaling globally. Founded and operated by a Vietnam-based team, Diaflow has rapidly captured international demand – with **75%** of its 40,000+ users based in the United States.

Diaflow leverages Amazon Bedrock to give its B2B customers seamless access to the latest foundation models, while focusing its core engineering on workflow orchestration, execution governance, and multi-agent coordination. This means customers always have access to state-of-the-art AI capabilities without compromising enterprise security.

Building on AWS infrastructure has enabled Diaflow to accelerate deployment velocity three-fold, while maintaining **99.99%** system availability across high-concurrency workloads, and driving a **35%** reduction in infrastructure cost per task.

With more than 100 million AI tasks executed to date, Diaflow demonstrates how Vietnam-founded AI startups can rapidly scale to compete in the global B2B agentic automation market.

“AWS gives us the foundation to move fast without compromising enterprise security. Amazon Bedrock lets our customers access frontier models instantly while we focus on what differentiates us: orchestration, governance, and multi-agent coordination at scale.” – Jonathan Viet Pham, CEO, Diaflow



The next AI skills challenge: judgement, not just technical expertise

Vietnam's AI skills challenge is evolving – it is no longer simply access to technical talent, but ensuring organisations have the internal governance, workforce capability and decision-making processes needed to use AI confidently and responsibly. As AI becomes more embedded in business operations, organisations that invest in internal governance alongside workforce capability will be better positioned to move beyond experimentation and scale AI successfully.

Further development of Vietnam's skills base is key to supporting more AI adoption and greater AI integration. **54%** of organisations identify shortages of AI and digital skills as a barrier to adopting or expanding AI. Businesses have recognised this, with **26%** of employees having participated in digital training or upskilling in the past year – up from **19%** last year. The types of training initiatives businesses have implemented are in-house training programmes (**43%**), online learning platforms (**36%**), and external training courses (**31%**). Businesses are backing the shift with investment: they would increase a salary offer by an average of **41%** for a candidate with strong AI skills, and **87%** say reskilling existing employees is important to their AI strategy.

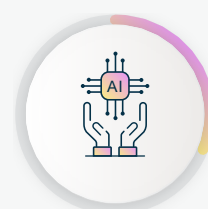
But the skills issue is compounded by a deeper shift in the capabilities organisations now need. As AI systems become more capable, the challenge is no longer only about access to technical expertise – businesses identify human judgement as the critical capability for an AI-enabled workforce.

57% of business leaders expect skills such as interpreting, validating, and challenging AI-generated outputs to become increasingly important over the next five years. When asked about non-technical skills that will become more important, **62%** identify critical thinking and judgement, **58%** cite adaptability and continuous learning, and **44%** highlight ethical reasoning and responsible use of AI as skills that will become more important as adoption increases. This reflects a growing recognition that the future of work will depend not only on using AI, but on understanding when to trust it, when to question it, and when human intervention is required.

Organisations are still preparing for this shift.



38% say their employees lack confidence in knowing when AI outputs should be trusted and when they should be challenged



Employees are beginning to approach AI in more sophisticated ways and with greater awareness. Nearly a third (**31%**) report that AI-generated outputs are routinely questioned or validated before use, though **27%** report that employees mostly accept outputs with only limited oversight

Governance gaps further compound the challenge:



51% of organisations lack clear guidelines on when employees should escalate or override AI-driven decisions



21% have a dedicated team or function responsible for AI governance and regulatory matters; for the rest, responsibility is typically shared across existing teams such as IT, legal and compliance, or executive leadership

Sector spotlight: Healthcare demonstrates AI's practical value despite resource constraints

While the sector has traditionally faced resource and workforce constraints, many organisations are increasingly using AI to improve efficiency, support decision-making, and streamline administrative processes.

23% of healthcare organisations report currently using AI, while **6%** say AI is fully integrated. **72%** of healthcare businesses say AI will transform their industry in the next five years.

This optimism is reflected in how businesses are applying AI:

54% are using AI to support administrative efficiency, compared with **39%** across all sectors

54%

47% are using AI to support data analysis and decision-making, compared with **43%** overall

47%

69% of healthcare organisations report productivity gains from AI adoption

69%

In healthcare, the main areas for growth are in governance and capability:

17% of healthcare organisations report having a formal AI strategy

17%

while **13%** have a responsible AI framework in place

13%

This suggests many organisations are seeing benefits from AI but have yet to establish the structures needed to scale deployment confidently and consistently.

Healthcare reflects a broader trend across Vietnam's economy. Organisations can see clear value from AI and are increasingly embracing it, but many continue to face challenges in moving from individual use cases to organisation-wide transformation. The lesson is clear: success will depend on investment in people, governance, and organisational readiness. Those organisations able to combine all three will be best positioned to translate adoption into long-term impact.



Case Study: OmiGroup builds evidence-grounded causal reasoning for chronic disease on AWS



OmiGroup, a Vietnam-based healthcare IT company with 14 years of experience, developed OmiKG, a proof-of-concept AI reasoning engine that traces chronic disease mechanisms back to molecular-level evidence. Built on AWS by a team of five, and unlike general-purpose AI tools that operate as “black boxes,” OmiKG maps patient clinical inputs onto an evidence-graded knowledge graph of disease mechanisms, with every causal relationship linked to peer-reviewed literature. Amazon Bedrock powers two core capabilities: extracting causal relationships from biomedical literature and analyzing patient-specific causal pathways at runtime.

In a controlled evaluation, two independent clinical experts blindly assessed OmiKG across 20 clinical questions on Type 2 Diabetes mechanisms. OmiKG identified 15 of 17 representative molecular mechanisms, compared to one and zero for two alternative AI approaches, while matching general-purpose AI on breadth of coverage. OmiGroup is in discussion with potential partners to bring OmiKG to market, with Vietnam, Japan and Korea as priority markets given the company’s existing healthcare IT presence in these countries.

“We started by building a nutrition advice system for diabetic patients and quickly discovered that the hardest problem was not accuracy. It was verifiability. When we could not trace how an AI model reached its conclusions, we knew clinicians would not be able to trust it. That insight led us to pivot toward structured, evidence-grounded reasoning, and AWS’ Amazon Bedrock made it possible for a research team of five to develop and validate this at the pace that would otherwise require significantly more resources.” – Nhung Nguyen, Head of AI Research, OmiGroup





Recommendations: Unlocking Vietnam's AI future

Vietnamese businesses are optimistic about AI's potential, adoption is accelerating, and strong digital foundations are already in place. The challenge now is ensuring organisations across the economy have the skills, confidence, infrastructure, and policy environment needed to move beyond experimentation and harness AI at scale. Businesses are facing the same obstacles to adoption that they reported in last year's report. However, both businesses and the government are taking steps to address these challenges.

The following recommendations identify six priority actions that would further help unlock the next phase of AI-enabled growth in Vietnam.

1. Accelerate business readiness for the next wave of AI

Vietnamese businesses have adopted AI, but most are still experimenting rather than transforming. As next-generation technologies like agentic AI emerge, the businesses that benefit will be those with the right foundations already in place. Two actions will help:

1. Move beyond isolated pilots by identifying the AI use cases with the clearest path to organisation-wide deployment, and resourcing them properly.
2. Build the technical foundations that scaling depends on – reliable access to AI infrastructure, and the in-house or partner expertise to implement it.

Policymakers, industry bodies and technology providers can support this by improving access to infrastructure, implementation support and practical guidance – helping businesses move from isolated pilots to full deployment and realise the productivity and innovation benefits of AI. As Vietnam implements its new data frameworks, including the Data Law, the Personal Data Protection Law and the Cybersecurity Law, clear and workable rules on cross-border data flows will also be important in enabling businesses to access the AI tools, infrastructure and services they need to scale.

2. Build confidence in AI investment through better measurement and ROI frameworks

Vietnamese businesses are ready to invest in AI. What they need now is a clear way to know whether that investment is paying off. Three steps will help:

1. Define success metrics before launching any AI project. Tie them to specific business outcomes like cost reduction, processing speed, or customer satisfaction.
2. Benchmark results at regular intervals against those metrics and against industry peers where data is available.
3. Use this evidence to make informed decisions on whether to scale, refine, or discontinue each project.

Government and industry associations can support this by developing practical measurement toolkits and publishing sector-specific case studies that show what "good ROI" looks like in practice.

3. Support effective, innovation-friendly implementation of Vietnam's new AI Law

Vietnam has moved early on AI governance. The Law on Artificial Intelligence (No. 134/2025/QH15), in force since 1 March 2026, makes Vietnam one of the first countries in Southeast Asia with a dedicated, risk-based framework for AI – including tiered obligations calibrated to risk, shared responsibility across the AI value chain, regulatory sandboxes, and transition periods for businesses to adapt. The opportunity now lies in implementation: translating the law's framework into clear, predictable rules that build confidence to scale AI while managing risks appropriately. Two steps will help businesses navigate this area:

1. Adopt interoperable, international standards and industry-led best practices to demonstrate responsible use, rather than navigating duplicative, jurisdiction-specific requirements.
2. Make full use of the mechanisms the law already provides: the regulatory sandbox, which allows businesses to test innovative AI applications under supervision, and the transition periods, which give organisations time to build the governance capabilities the law requires.

Following the issuance of the high-risk AI list in June 2026 (Decision 33/2026, effective 15 August), policymakers can support this by keeping the definition of high-risk AI systems clear and predictable. Implementation should concentrate compliance obligations on the applications where consequences are genuinely significant, such as drug discovery, transport safety, or healthcare systems, rather than applying them broadly, so that governance effort is focused where it matters most and businesses have the certainty they need to invest. Issuing implementing guidance early, consulting closely with industry, and aligning implementing decrees and technical guidance with international standards and industry-led best practices will foster multi-stakeholder dialogue and promote interoperability with regional and international approaches. The public sector can also lead by example – adopting AI to transform the delivery of public services and demonstrating that proportionate, risk-based governance is an enabler of innovation rather than a barrier to it.

4. Strengthen the infrastructure foundations that AI at scale depends on

AI adoption at scale is ultimately built on physical and digital infrastructure: reliable power, modern data centres, and affordable access to compute and cloud services. As Vietnamese businesses move from experimentation to deployment, and as more data- and compute-intensive technologies such as agentic AI emerge, demand on this infrastructure layer will grow rapidly – **33%** of businesses already cite limited access to next-generation AI tools or infrastructure as a barrier to adoption. Two steps will help businesses navigate this:

1. Adopt cloud and managed infrastructure services rather than relying solely on in-house capacity, so that scaling AI workloads is not constrained by physical infrastructure limits.
2. Assess infrastructure needs – compute, data, and connectivity – early in AI planning, so that constraints surface before deployment rather than during it.

Policymakers can support this by treating digital infrastructure as strategic national infrastructure – investing in reliable, sustainable power and grid capacity so that energy availability does not become a constraint on digital growth; streamlining planning and approval processes for data centres and supporting energy infrastructure so that capacity can be built at the pace demand requires; coordinating energy and digital planning; accelerating approvals; and creating mechanisms that give businesses of all sizes affordable access to the compute and cloud capacity on which the next wave of AI depends – ensuring the benefits of AI infrastructure are not concentrated among the largest organisations.

5. Build the human capability to work effectively alongside AI

As AI becomes embedded in day-to-day operations, Vietnam's AI challenge is a human one. Technical skills shortages remain, but businesses now recognise that judgement, oversight, and the ability to work effectively alongside AI matter just as much. Closing this gap requires investment across the full capability spectrum. Three steps will help:

1. Expand the definition of "AI skills" beyond technical roles. Organisations need data scientists and engineers, but they equally need professionals who can interpret AI outputs, exercise judgement over automated recommendations, and identify when human intervention is required.
2. Embed AI literacy across the workforce – not only in technology teams, but in the functions where AI is increasingly being applied: operations, finance, customer service, and decision-making roles. This means practical, role-specific training rather than generic awareness programmes.
3. Create structured pathways for continuous learning, recognising that AI capabilities evolve rapidly. Partnerships between industry, education institutions, and government can help ensure the pipeline of talent keeps pace with the technology.

Policymakers and industry bodies can support this by investing in scalable upskilling programmes, integrating AI literacy into national education and workforce strategies, and creating incentives for businesses – particularly SMEs – to invest in building these capabilities internally.

6. Use sector leaders to accelerate adoption across the wider economy

Sectors like financial services and healthcare are already showing what effective AI deployment looks like, delivering measurable productivity, operational and customer benefits. Their experience is a resource the rest of the economy can learn from. Two steps will help:

1. Capture and share what works by documenting the use cases, implementation approaches and lessons learned from sectors that are further ahead.
2. Collaborate with other businesses and governments to demonstrate and encourage best use, sharing practical experience across sector and organisational boundaries so that adoption spreads faster than any single organisation could achieve alone.

Policymakers can support this by translating what works into sector-specific guidance, so businesses can see how AI applies to their own operations rather than starting from scratch, and by pairing this guidance with practical implementation support that helps businesses act on it, regardless of their size or starting point. Creating opportunities for knowledge sharing and highlighting successful use cases will reduce uncertainty, accelerate adoption, and ensure businesses across Vietnam can benefit from AI whatever their sector or starting point.





From adoption to impact: Vietnam's moment to accelerate

Vietnam has entered a new phase of its AI journey. Adoption continues to accelerate, businesses are reporting productivity and revenue gains, and AI is recognised as central to future competitiveness. The focus must shift to ensuring this momentum translates into organisation-wide transformation. While many businesses have embraced AI, deeper and more advanced adoption will mean more work developing the strategies, governance, measurement frameworks, and workforce capabilities needed to scale it confidently and prepare for the next generation of AI technologies.

Vietnam is well positioned to seize this opportunity. As innovation cycles continue to accelerate, businesses that strengthen these foundations will be best placed to move beyond isolated AI use cases and unlock AI as a driver of productivity, innovation, and growth. By supporting organisations of all sizes to scale AI responsibly, Vietnam can ensure the benefits of AI are realised across its economy and reinforce its position as one of Southeast Asia's leading digital economies.

Appendix

Methodology

The fieldwork for this study was undertaken by Strand Partners' research team for Amazon Web Services. This research has followed the guidance set forth by the UK Market Research Society and ESOMAR. For the purposes of this study, business leaders are defined as founders, CEOs, or members of the C-suite in organisations.

'Citizens' are nationally representative members of the public based on the latest available census.

For inquiries regarding our methodology, please direct your questions to: polling@strandpartners.com.

In Vietnam:

- We conducted a survey targeting 1,000 nationally representative members of the public, ensuring representation based on age, gender, and region.
- Additionally, we surveyed 1,000 business leaders, representative by their business size, sector, and region.

Sampling:

Our sampling process used a mix of online panels that are recognised for their validity and reliability. These panels are carefully curated to ensure diverse representation across various demographics. For the business leaders, the panels are selected with a consideration for organisational size, sector, and position within the company. Our objective with the sampling strategy is to achieve an optimal mix that mirrors the actual distribution of our target populations in the respective markets.

Weighting Techniques:

Post-data collection, we applied iterative proportional weighting to correct any discrepancies or over-representations in the sample.

Survey:

This study was designed with the objective of delving deep into the digital landscape:

- **Usage Patterns:** This survey gauges the evolving patterns of digital technology usage. We are particularly interested in examining the adoption and implementation levels of technologies, focusing on cloud computing and artificial intelligence.
- **Perceptions and Attitudes:** The survey seeks to unearth the prevailing perceptions and attitudes towards digital technologies, understanding the perceived benefits, challenges, and potential ramifications of both present and emerging tech solutions.
- **Barriers and Opportunities:** The survey scrutinises the predicted challenges and potential avenues that both businesses and individuals anticipate on their digital trajectory. This involves pinpointing challenges, from skill deficits to regulatory complications, and recognising opportunities for growth, innovation, and market development.
- **'Size of the Prize':** The survey shed light on the economic repercussions and growth prospects linked with digital transformation. By elucidating the 'size of the prize', we aspire to stress the importance of digital transformation and foster further investments and technology adoption.

References

1. Calculated based on recent estimations from the National Statistics Office of the total number of active registered enterprises
Source: <https://www.nso.gov.vn/en/px-web/?pxid=E0503&theme=Enterprise>